

Institute for Scientific Information®

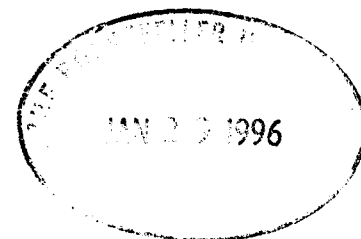


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Michael J. Tansey
Executive Vice President,
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January 24, 1996

Dr. Joshua Lederberg
President Emeritus
The Rockefeller University
1230 York Avenue
New York, NY 10021-6399
USA



Dear Dr. Lederberg,

We are eagerly looking forward to the upcoming ISI Strategic Advisory Board meeting to be held in Philadelphia on February 27th through February 29th. We know that it will be as productive and stimulating as last year's meeting, and that we will all come away from it with new ideas and fresh insights.

This year we are structuring the agenda slightly differently from last year. We are soliciting the Strategic Advisory Board's thoughts and opinions on four topics. We will then distribute everyone's responses to all attendees and use them as the basis for guiding the discussion on the first day of the meeting. This year, however, we are also having ISI staff members investigate the issues and form an ISI position. This will also be distributed with everyone's responses. Tenex Consulting has also been retained to facilitate the first day of the meeting. Our objective is to set the stage for a highly interactive session that will provide us all with the opportunity to investigate the key issues driving the information industry.

Attached please find the topics that we would like you to address. Feel free to keep your responses informal and communicate with us by whatever method you find most convenient -- e-mail, fax, or letter. Your responses should be sent to Carolyn Finn (cfinn@isinet.com; fax (215) 386-6362) by February 9, 1996.

We will incorporate all the Strategic Advisory Board's responses and ISI's into the meeting agenda package which will be sent to everyone by February 14th. We will contact you shortly to confirm specific travel arrangements.

I would like to thank you in advance for your active participation in ISI's Strategic Advisory Board. I look forward to meeting with you in February.

Sincerely,

A handwritten signature in black ink, appearing to read "Mike", written in a cursive style.

Michael J. Tansey

MJT:cf

Issue A. The Traditional Method of Accessing the Research Literature are being Changed by Technology

We see technological change having an impact on the traditional methods of accessing research literature now and into the foreseeable future (1 - 3 years.) When you answer this set of questions, you may agree or disagree with this assumption. If you agree, then focus internally (as the consumer) on your organization and discuss what technological changes you see being adopted at your organization, their impact on your responsibilities and the existing infrastructure of how you do your job. If you disagree that technology is changing literature access, then please discuss your reasons.

Technology

1. Where are universities/companies investing their technology dollars? WWW at library? on researchers' desktops? students' desktops? LAN/WAN consortia? State-wide consortia (government or self supported)?
2. Will the World Wide Web be the publishing and distribution platform of the immediate future (next 1-3 years)? long term future? If not the Web, any other technology?
3. Will the Web completely replace traditional searching, retrieval and reference tools? If not the Web, any other technology? If not completely replace, then how will it coexist?
4. What electronic filters exist and/or are being actively used today (Web, Internet or other) to classify, abstract, link authors' works, and retrieve bibliographic/full text information?

Responsibilities

5. What challenges do the library and librarian face to accommodate the Web? If not the Web, any other technology?
6. How many end-users have browser capabilities and desk-top access to information sources? How many are still requesting librarian aid for searching?
7. Is the nature of the reference librarian's expertise changing? How do/will librarians use the Web? Perform actual searches or document resources available? If not the Web, any other technology?

Usage

8. How important will database suppliers be to the librarian? Will libraries want access only to high-quality databases or will librarians want to get all available electronic data and evaluate its quality after the fact. How is database supplier brand loyalty maintained in a generic information retrieval model?
9. Does the Web change your idea on the pricing model, that is, do you now prefer
 - a. no subscription fee for access and only a pay-per-hit or pay-per-download fee
 - b. subscription fee for access with no pay-per hit fee.
 - c. other. Please specify.

Issue B. Changes in the Publishing Value Chain

The traditional value chain is defined as:

Researcher ⇔ Primary Publisher ⇔ Secondary Publisher ⇔ Distribution Channel ⇔ User

The following set of questions focus on gathering intelligence about members of the traditional value chain. Although we all participate in the chain, each member has a unique role; therefore, when answering the questions, focus externally on other members of the chain and what changes you see taking place in their traditional role.

1. Researchers and Authors

Are there any significant changes to trends in the research field?

 - grant funding changes (government vs. corporate)
 - collaboration and peer review changes
 - faster turnaround time from completed research paper to publication
 - changes in copyright ownership
 - how universities and institutions measure performance for promotion and tenure decisions?
 - are electronic journals gaining popularity for reading?
 - is there a growing trend among researchers toward publishing in electronic journals? Discipline dependent?
2. Primary Publisher trends
 - what role will primary publishers play in the electronic age?
 - are publishers preparing to move into the electronic age?
 - will the peer review process change? how?
 - would you be satisfied searching individual Publisher Web sites for journals of interest?

- is there an increase in the number of universities becoming primary publishers?
- who will archive electronic materials?
- is there any indication that societies (other than ACM) are playing a more proactive role in archiving?

3. Secondary Publisher trends

- where should there be more emphasis placed? on content? software? or a package of both? Who are the market leaders in content and software?
- what role will secondary publishers play in an electronic age? (ISI?)
- how should ISI maintain content differentiation and brand loyalty? Add value features? Add _____? Provide _____?
- should ISI rethink its selectivity policy on journal coverage, that is, add more journals to be more comprehensive?

4. End-Users (Researchers, Librarians, etc.) trends

- more independent end-user searching vs. librarian intervention
- will budget preparation and the expense monitoring responsibility and process change in the electronic environment? (libraries and/or departments)
- how are end-users embracing the Web in your environment?
- who is providing end-user training and technical support for electronic access?
- will librarians or technicians decide on hardware, software and databases for library/desktop access to information?
- will hardware drive the software and database decision or vice versa
- is speed of access to the literature the most important issue to the end-user? If not, what is?

Issue C. Making Money in the Transition

Because the dynamics of the traditional chain are changing, how should ISI allocate resources to maintain products and service for the traditional markets while investing intelligently for future markets?

1. In which areas are non-traditional players investing their resources to enter into the scholarly research information business?
2. What are the traditional competitors doing to provide services? Strengths and Weaknesses.
3. Who might new competitors be?

4. Should ISI form new alliances? With whom?

5. Where should ISI put its resources

Example, prioritize the following or annotate if not recommended:

a. in short term?

☐ Web platform for product delivery and access

☐ Current Awareness

☐ Citation Indexes

☐ Added functionality for Web-based products. Specify.

☐ Add new value features. Specify _____

☐ Increase coverage

☐ Generally

☐ In targeted areas

☐ Develop standards for industry

☐ standard citation format for electronic and other resources

☐ standard _____

☐ Image-based document delivery via Web

☐ Commercialize Electronic Library Project

☐ Other? _____

b. long term?

☐ Web product

☐ Current Awareness

☐ Citation Indexes

☐ Add new value features. Specify _____

☐ Increase coverage

☐ Generally

☐ In targeted areas

☐ Develop standards for industry

☐ standard citation format for electronic and other resources

☐ standard _____

☐ Image based Document Delivery via Web

☐ Commercialize Electronic Library Project

☐ Other? _____

Issue D. ISI's Public Image

1. Has there been any change since last meeting regarding ISI's public image, products, customer service, support, responsiveness, etc.? Please specify.
2. What is the perception of STM primary publishers and secondary publishers, in general?
3. Has there been any change since last meeting in user's/customer's expectations? Please specify.